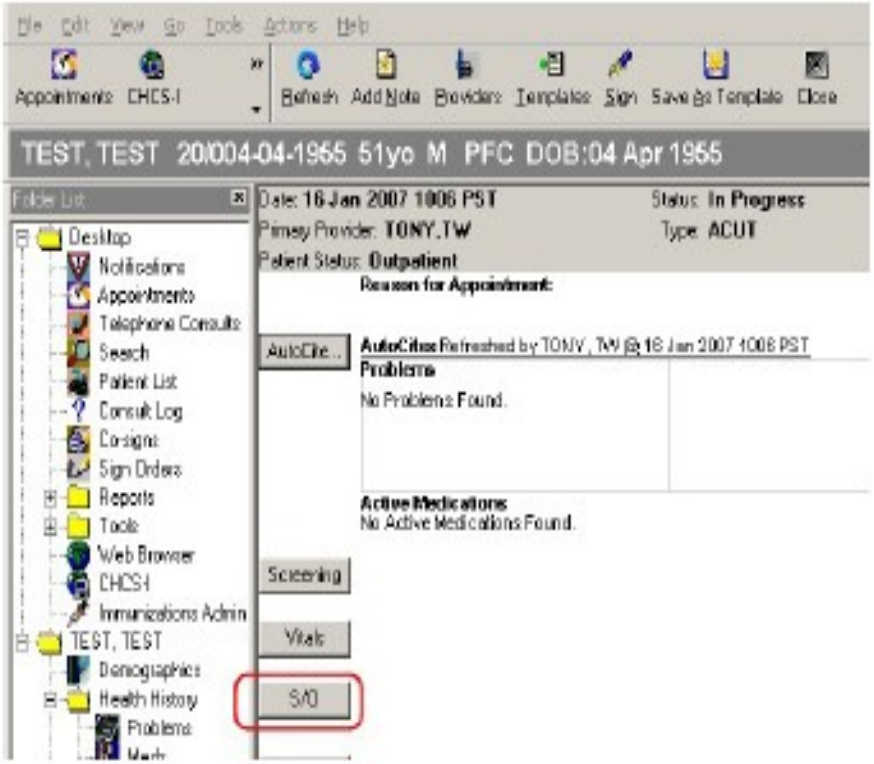
Finding and setting a Default Encounter Template

Start on the Appointment List

Double click to open a patient record.
You can use a real or a test patient for this.

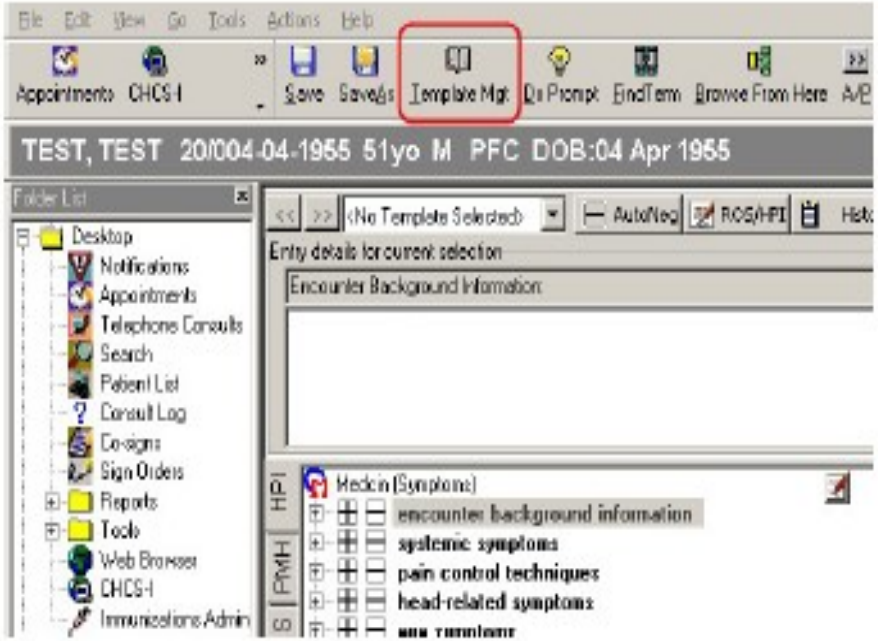
Go into the S/O Module to find an S/O Template to use as your Default S/O Template

Click on the S/O Button. Depending on your specialty, you may chose to create your own, or use someone else's then tailor it to fit your practice patterns. The Default S/O template should contain the most commonly used Medcin Terms you use in your day to day practice. For this example, we will use mine.



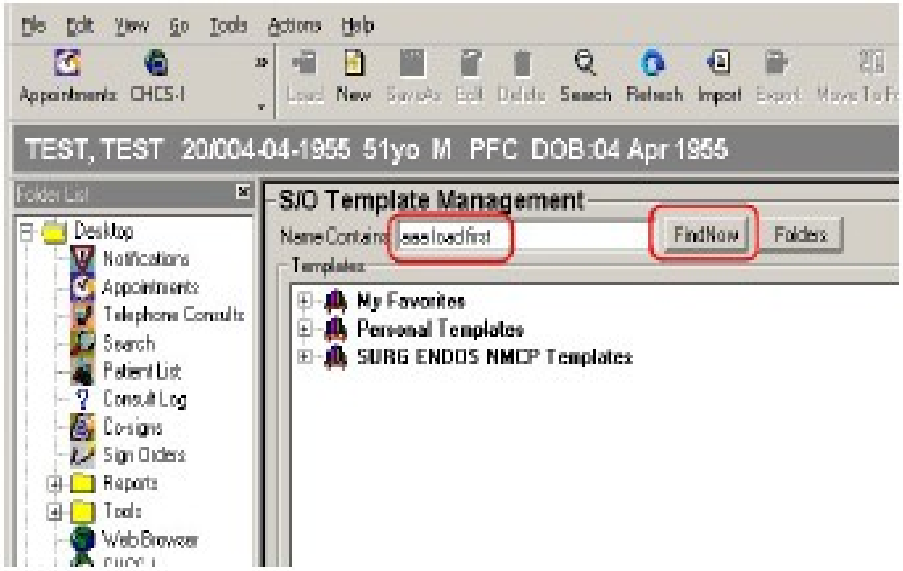
Go into Template Management to find the S/O Template

Click on the Template Mgt icon to enter the S/O Template Management Module. From here, you will search for my starter Default S/O Template.



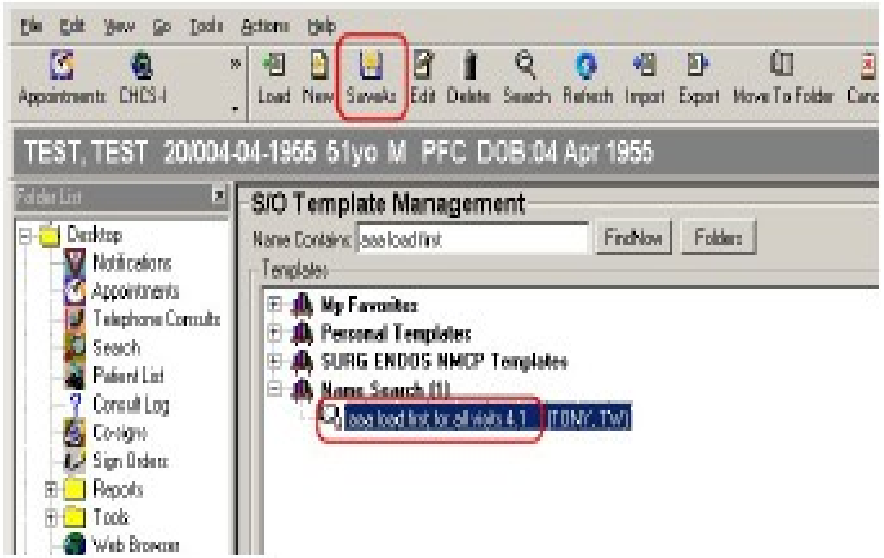
Finding an S/O Template to use as a starter

You may type 'aaa load first' (omitting the "s) as shown, then press the 'Find Now' button. This template can be edited later for customization to reflect your practice patterns. The object is to have a template that has the most commonly used Medcin Terms that you use, so repetitive searching is not needed.



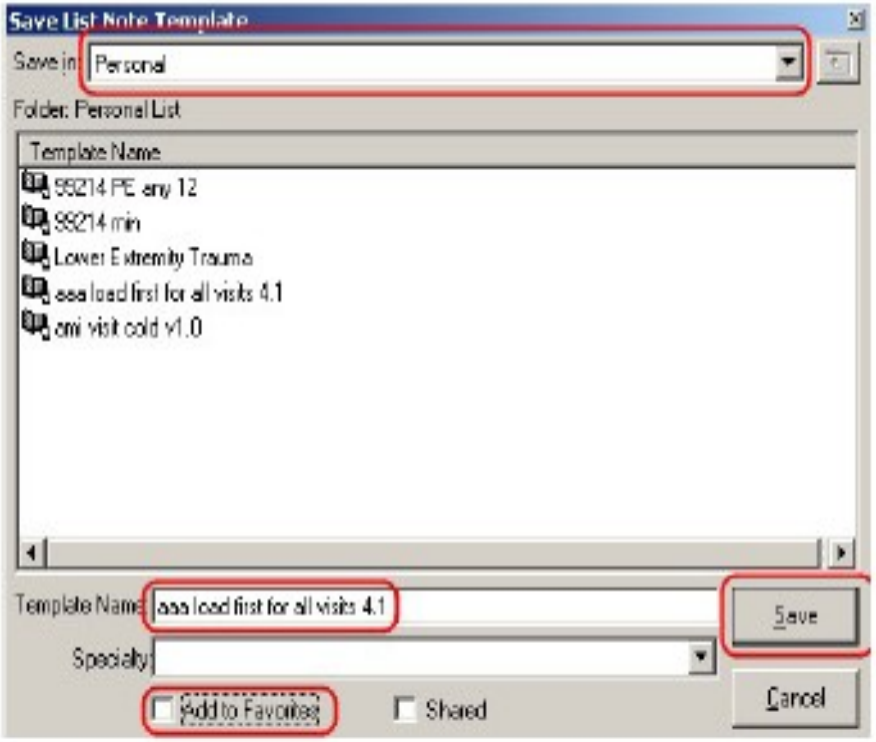
System displays a list of templates that match the search criteria

1. Bringing back the search list may take a minute or two. There are many templates in the system with this same name. One that is labeled v4.x is one of the more current ones created. Select it by clicking once on it, then click the 'SaveAs' button. Remember, this can be edited later.
2. Select the template, then click the 'Save As' button.



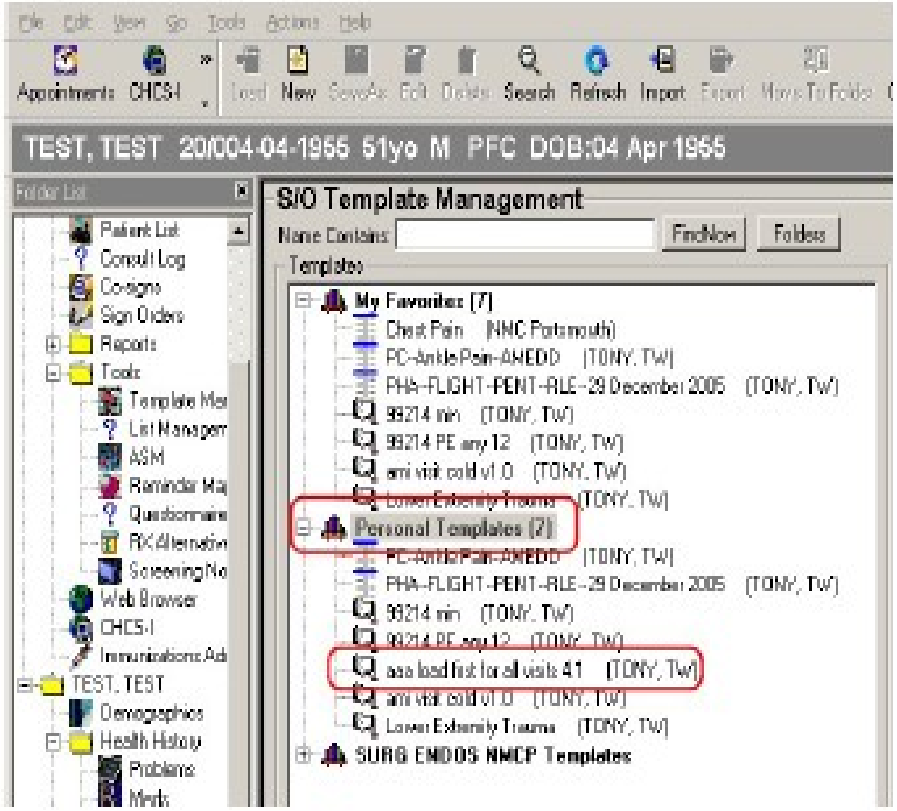
Saving the template as your own

1. Make sure 'Personal' is displayed at the top. If not, you can change it with the down arrow to the right.
2. Then give it a name. You can keep the same name.
3. Un-check the 'Add to Favorites' box.
4. Then press the 'Save' button.



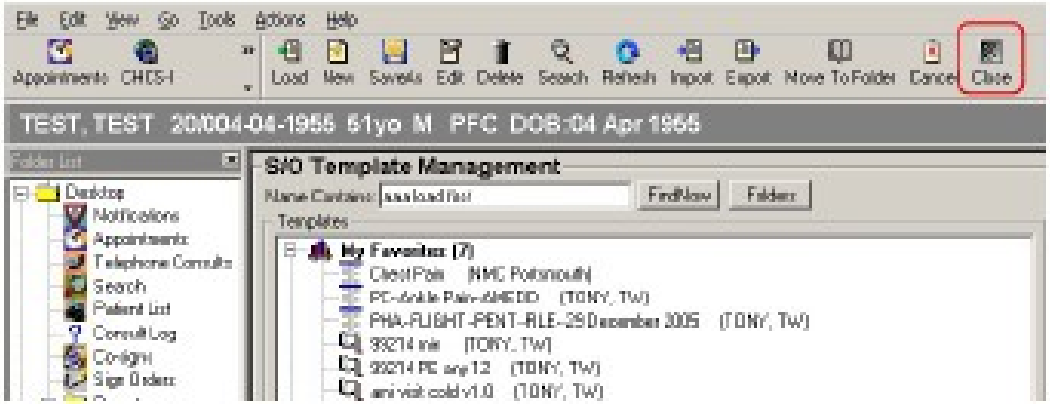
Verifying that the template was saved in your Personal Templates folder

If you expand the Personal Templates Folder by clicking the small '+' to the left of the words 'Personal Templates', you should see the 'aaa load first for all visits 4.x' template.



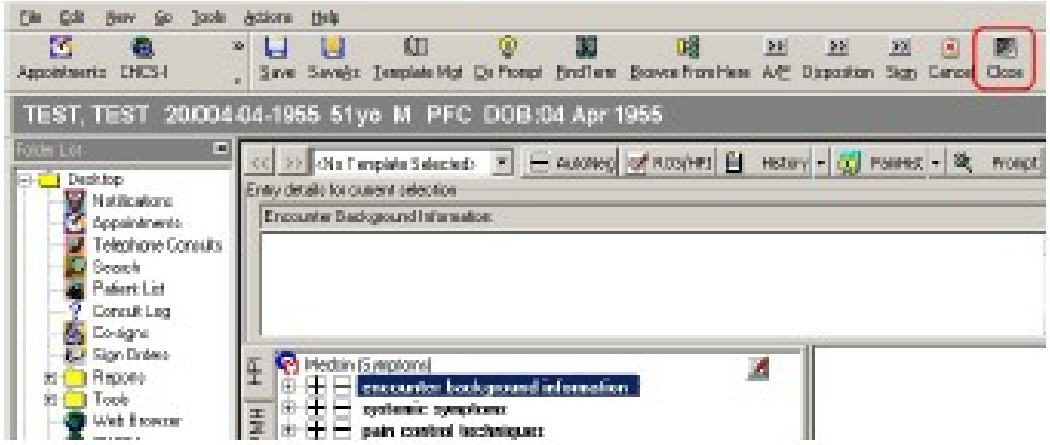
Closing the S/O Template Management Module

Click the 'Close' box



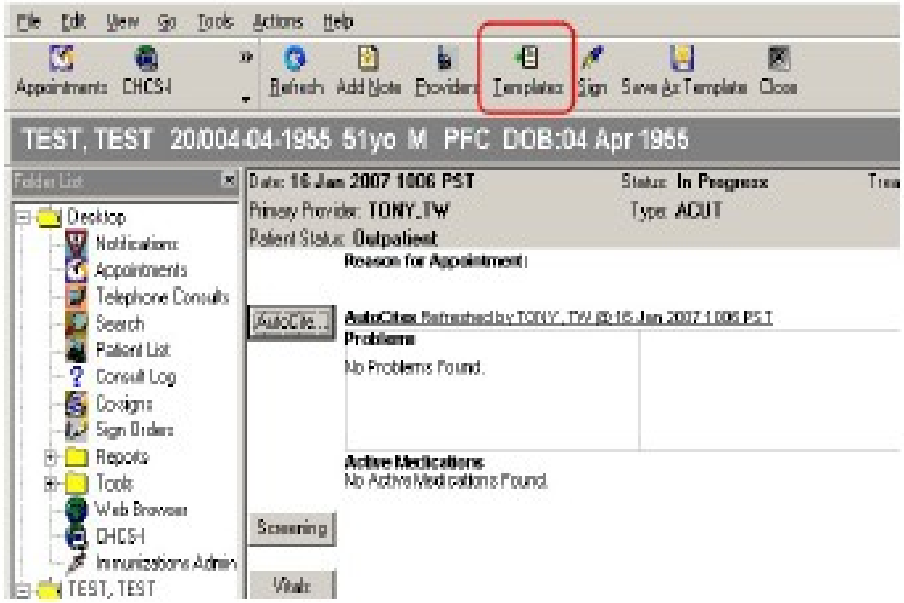
Closing the S/O Module

Click the 'Close' box



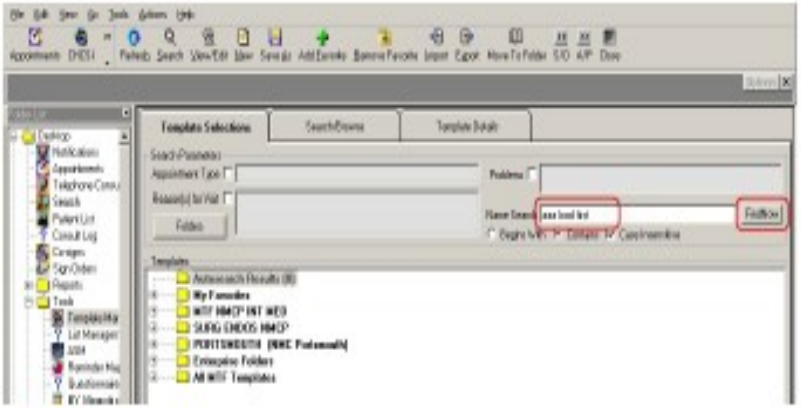
Opening the Encounter Template Module

Click on the 'Templates' icon with the little green dot



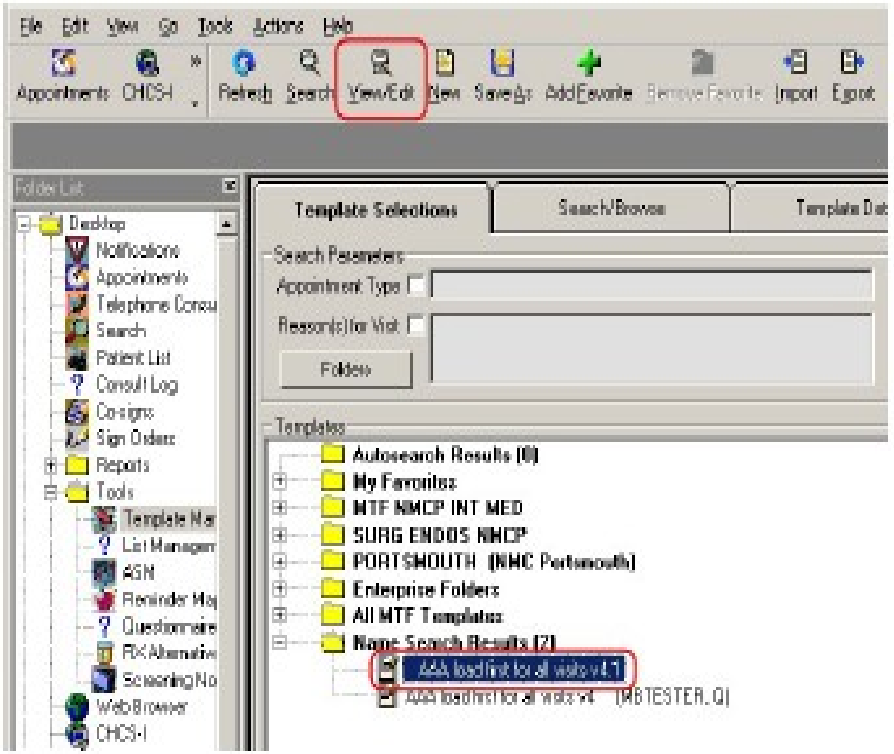
Search for the Encounter Template to be used as the default

1. Type 'aaa load first' (omitting the "s) as shown.
2. Then press the 'Find Now' button



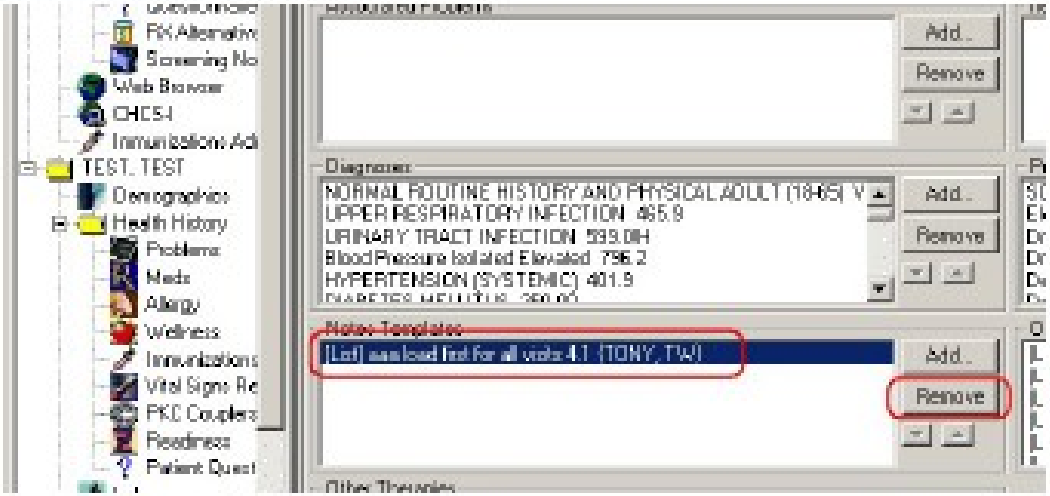
Selecting the Encounter Template to edit

1. Click once on the template to highlight it.
2. Then press the 'View/Edit' button at the top



Removing the current linked S/O Template (to replace with yours)

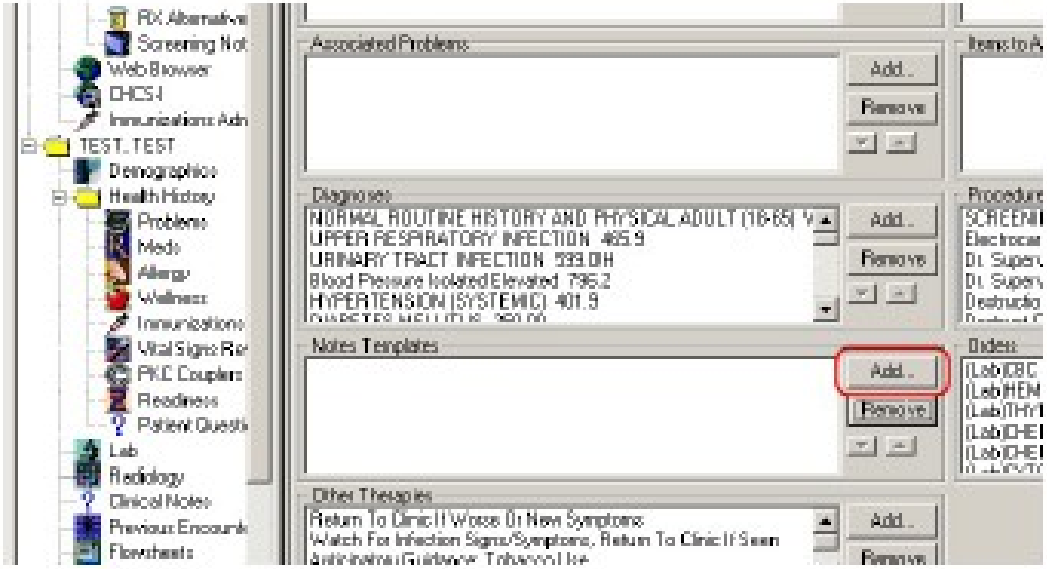
1. Find the box called 'Notes Templates', select the template that is shown in this box
2. Click the 'Remove' button.



Adding in your S/O Template

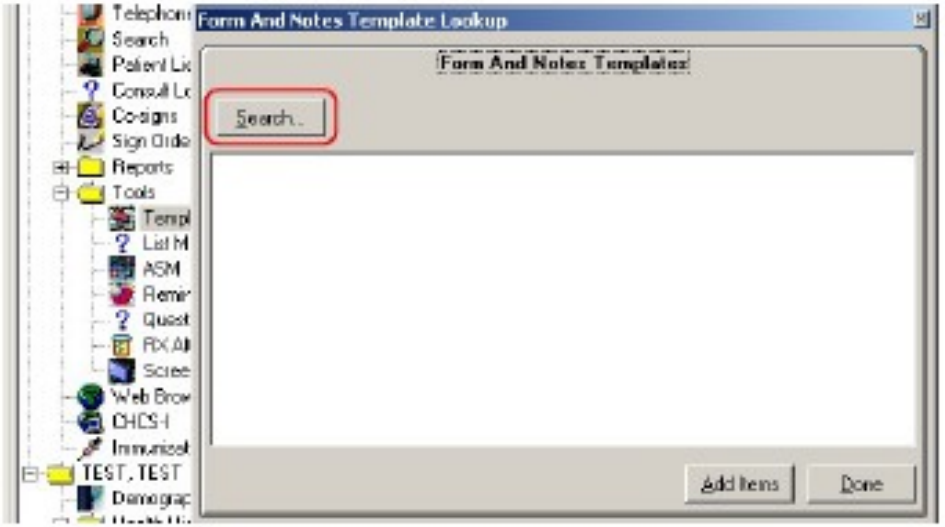
Click the 'Add' button

Add a default S/O or AIM form when you have one that works best in most situations. If you use many templates to document the S/O then this is optional.



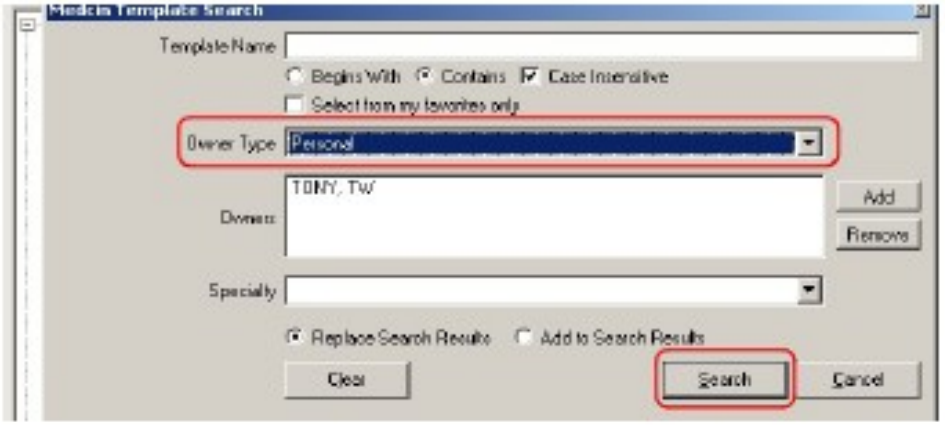
Procedure to Search for your S/O Template

Click the 'Search' button



Search only within your Personal List (Very Important)

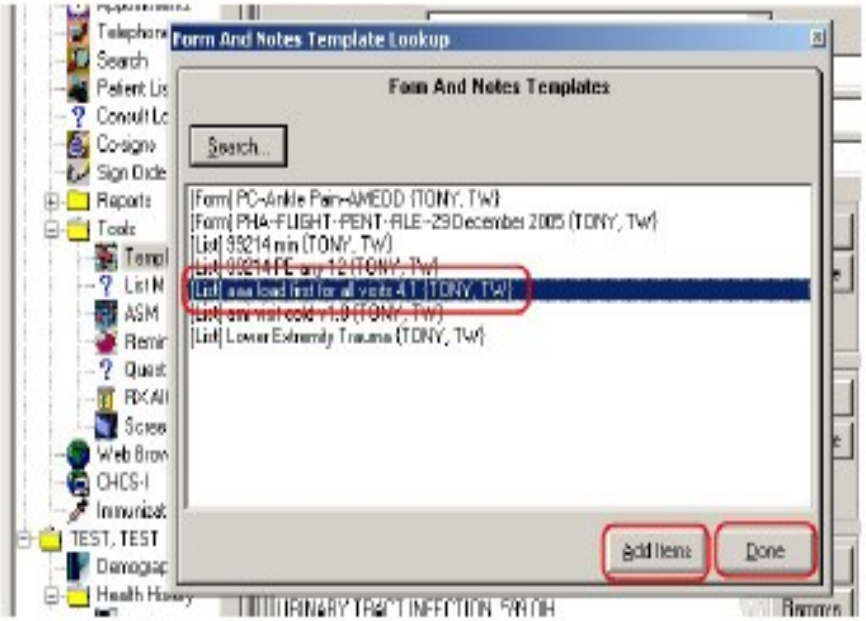
1. Make sure the 'Owner Type' is selected as Personal. To do this, click on the small downward triangle to the right, and select Personal. Failure to do this, will cause the system to freeze, as it will be searching the entire Enterprise to pull up every template. If this happens, you must press 'Ctrl-Alt-Del' and quit AHLTA, then restart, and repeat.
2. Click the 'Search' button.



Selecting your S/O Template

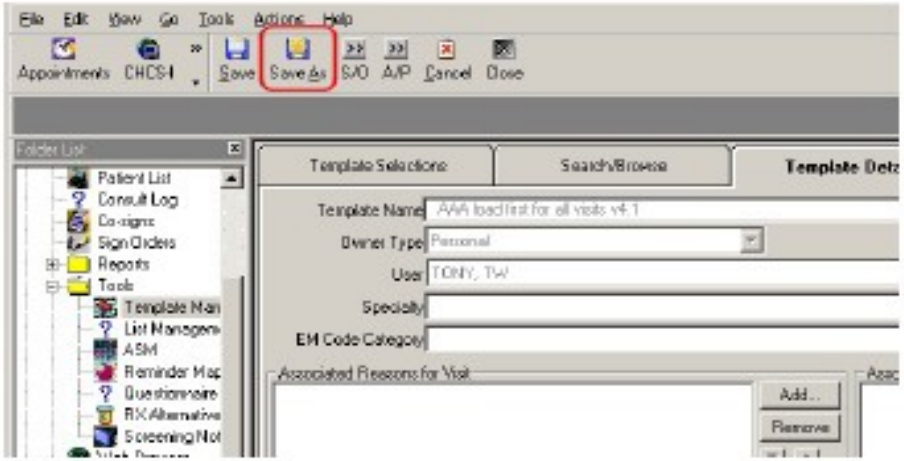
The system will bring back a list of your personal templates.

1. Select the 'aaa load first for all visits 4.x' template
2. Then press the 'Add Items' button.
3. Next, press the 'Done' button.


Form And Notes Template Lookup
Form And Notes Templates
Search...
[Form] PC-Ankle Pain-AMEDD (TONY, TW)
[Form] PHA-FLIGHT-PENT-RLE-29December 2005 (TONY, TW)
[List] 99214 min (TONY, TW)
[List] aaa load first for all visits 4.1 (TONY, TW)
[List] Lower Extremity Trauma (TONY, TW)
Add Items
Done
TEST, TEST

Saving the Encounter Template as yours

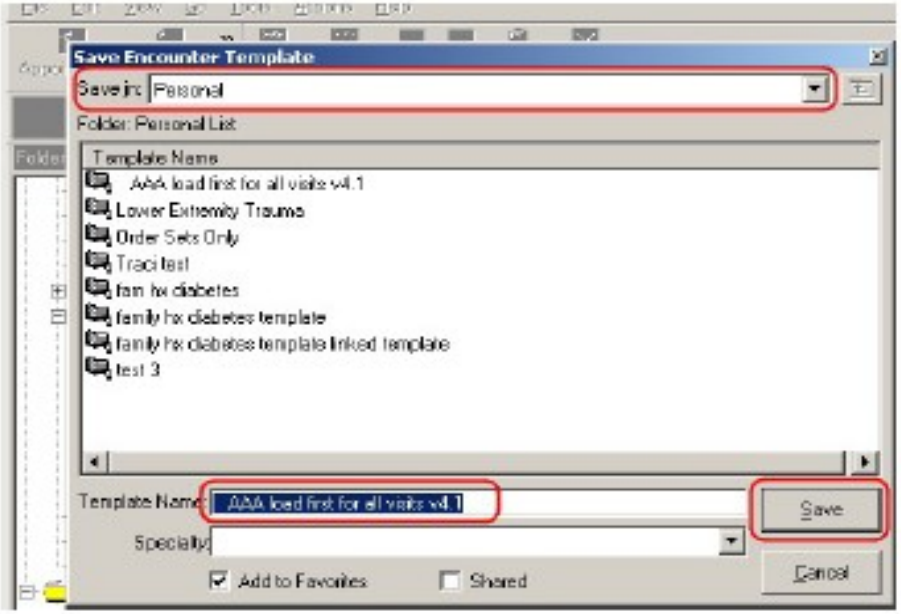
Click the 'Save As' button



More Saving the Encounter Template as yours

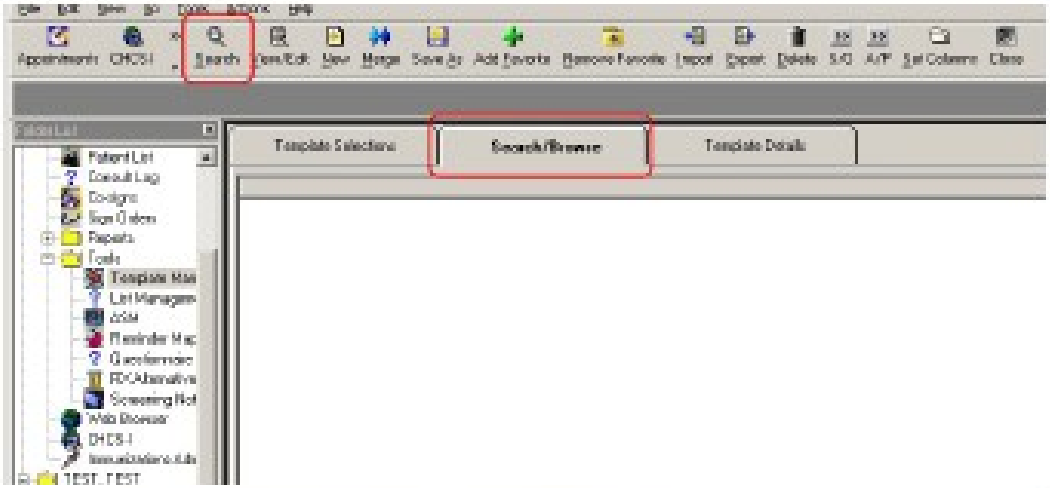
1. Make sure the 'Save in' destination is set to 'Personal'. If it is not, click the small downward triangle to the left, and select 'Personal'.
2. Place some leading SPACES in front of the name, so that it will show up at the top of your list.
3. Press the 'Save' button.

Note: In 838p20, the 'Add to Favorites' checkbox doesn't work. The following steps show the work-around for this.



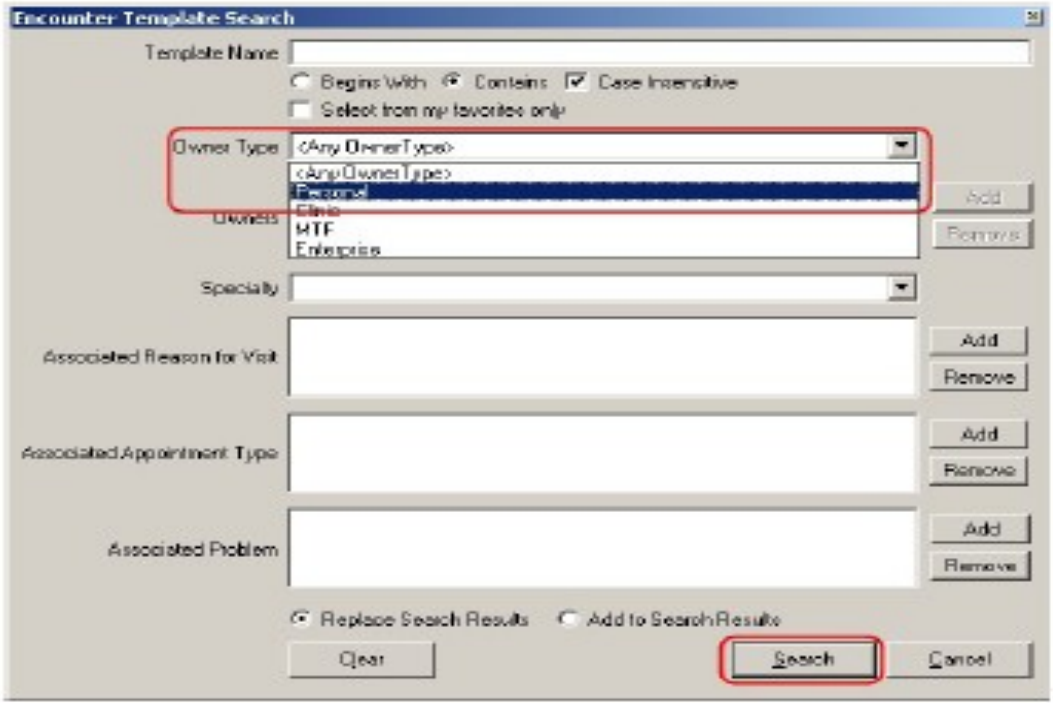
Work-around Procedure to Add the template to My Favorites List

1. Click on the 'Search/Browse Tab'
2. Then click the 'Search' button



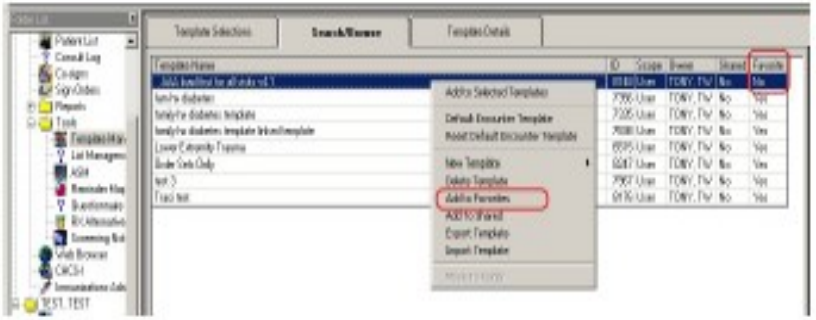
Narrowing search criteria to 'Personal' (Very Important)

1. Make sure the 'Owner Type' is set for Personal. Do this by clicking the small downward triangle, and selecting Personal. This is very important. Failure to do this, will result in a very long wait.
2. Click the 'Search' button.

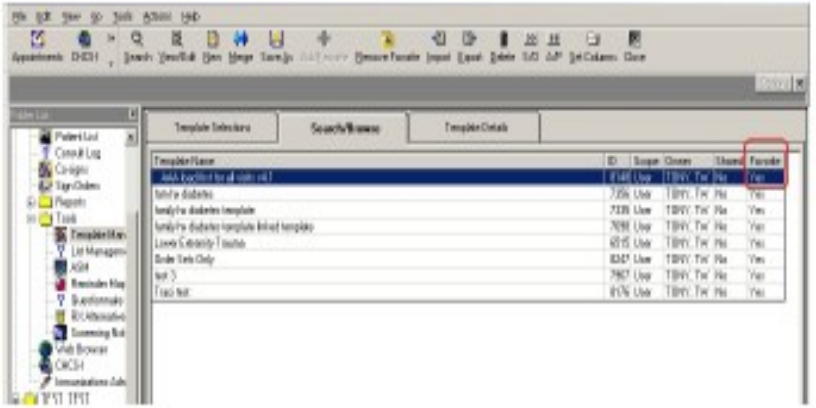


Setting Your Encounter Template to show up in My Favorites List

Right click on your Encounter Template, and on the Dropdown menu, click 'Add to Favorites'

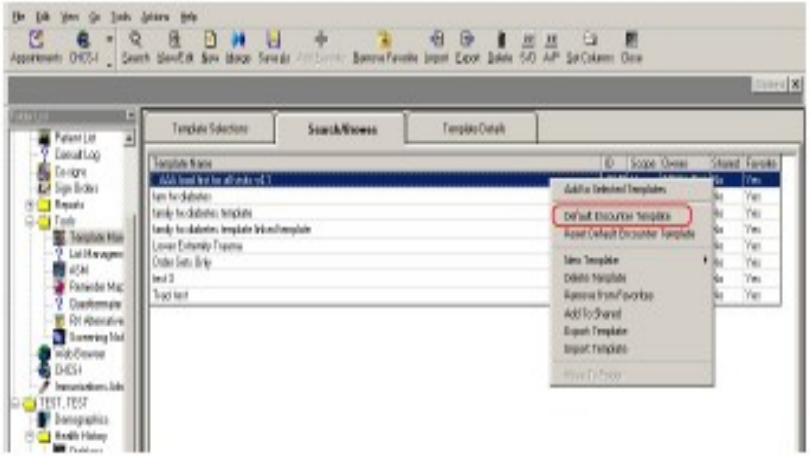


Screen showing the template is in My Favorites List



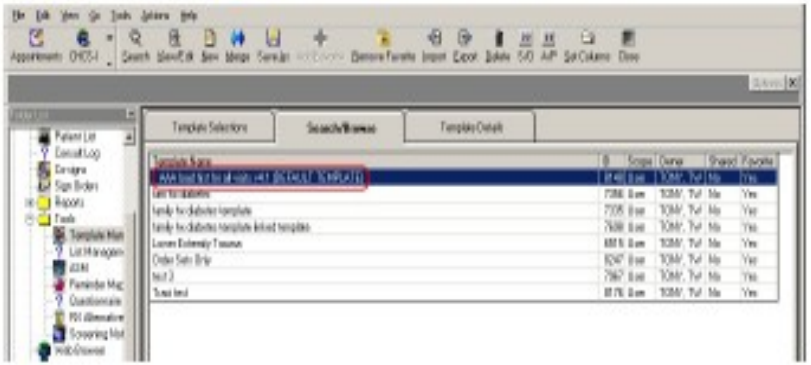
From here, you can set the Encounter Template as the Default Encounter Template

1. Right click on the template
2. Select 'Default Encounter Template' from the Dropdown menu.

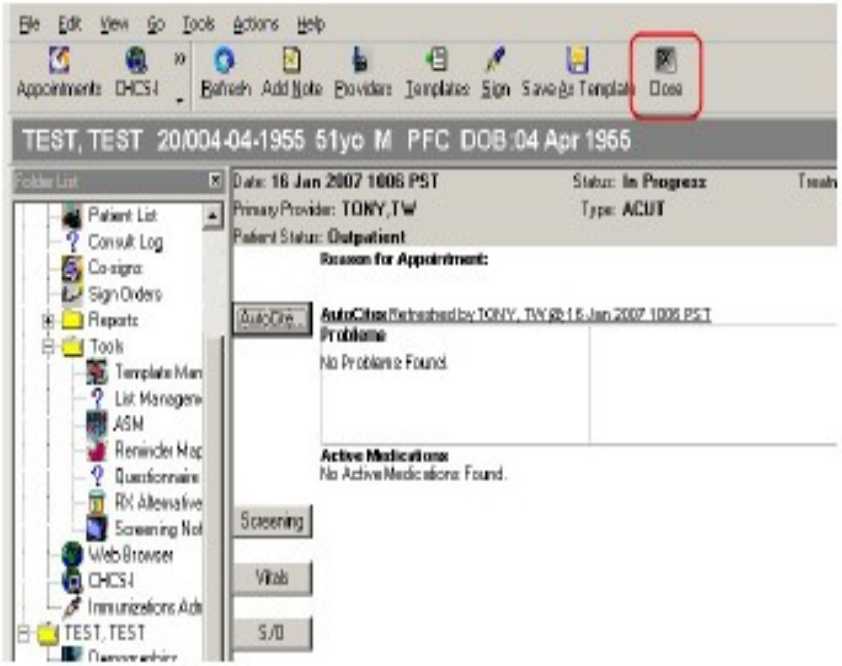


Screen showing that the template is now set as the Default Encounter Template

Now, click the 'Close' button to finish this process.

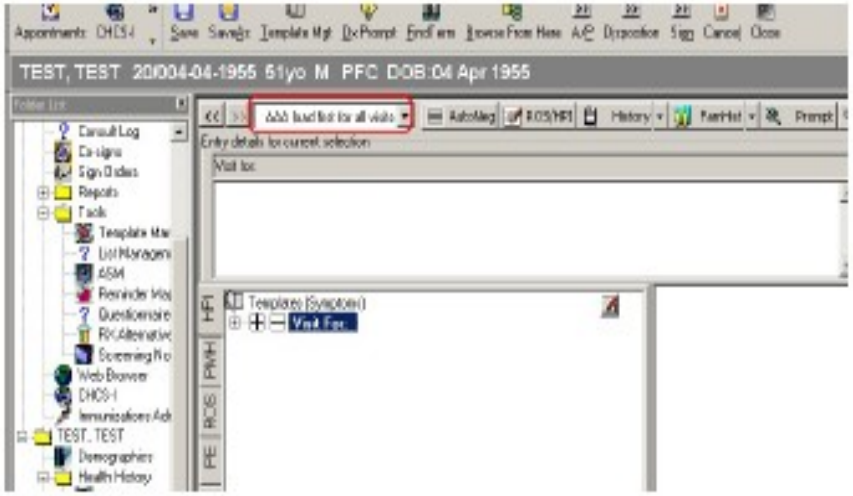


Click the 'Close' button



Display of S/O Module with Default Encounter Template Set

Notice the ' AAA load first' template is set as the default. Now go to the A/P Module



Display of A/P Module with Default Encounter Template Set

Notice the ' AAA load first..' template is set as the default. This template will load for every patient, every new encounter. These templates can be edited to decrease the need for you to repetitively search those commonly searched items.